

Financial and Project Progress Reports

Reference Guide for Grants Specialists





Table of Contents

Creating Financial Progress Report – Simple Version	3
Creating Financial Progress Report – Expanded Version	
Creating the SF270 Report – Simple Version	15
Creating the SF270 Report – Expanded Version	17
Completing Manual Closeout	19
Accessing Existing Financial and Project Progress Reports	20



The purpose of this document is to provide Grants Specialists (GS) with a step-by-step process for completing Federal Financial Progress Reports, SF270 Reports, and Manual Closeouts in Grants Online. In addition, this document provides guidance on accessing existing Project Progress Reports and Financial Reports in Grants Online.

Creating Financial Progress Report – Simple Version

Step 1: Log into Grants Online by entering your Username and Password.





Step 2: Select the *Award* tab and click on the *Search Award* link to complete the Financial Progress Report.



Step 3: After selecting the *Search Award* link, enter at least one search criterion, including *Applicant Name* and/or *Award Number*. Click *Submit*.





Step 4: The following screen displays the search results. To select the Award, click on the actual Award number link in the *Award Number* column.

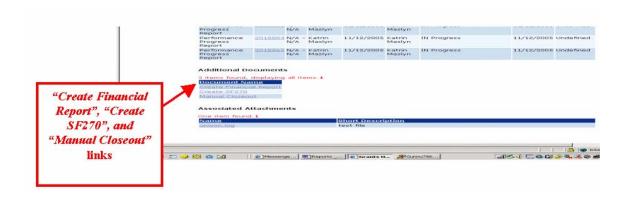


Step 5: Once you have selected an Award, the following *Grants File* screen is displayed.





Step 6: Scroll down to the bottom of the *Grants File* screen to view the *Additional Documents* section and select the *Create Financial Report* link. As a Grants Specialist, you have access to the following links which are addressed in this document: *Create Financial Report, Create SF270*, and *Manual Closeout*.

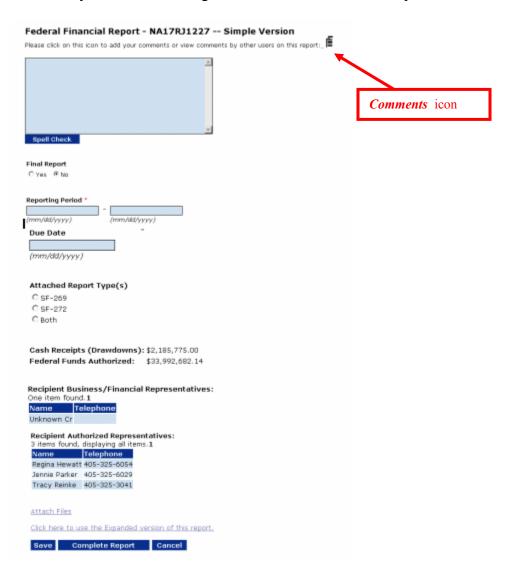


Step 7: Select the link entitled, Go to Federal Financial Report Details Page.





Step 8: The *Federal Financial Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.





Step 9: Complete the *Federal Financial Report - Simple Version* by entering whether the report is the *Final Report*, the *Reporting Period*, and the *Due Date*. The *Attached Report* radio buttons indicate the types of reports you can attach: SF-269, SF-272, or both. (Please note that migrated Awards will not have reports attached; as such, the *Attached Report* field will indicate which type of report was migrated from NGS.) If you wish to attach files, you may do so by selecting the *Attach Files* link.

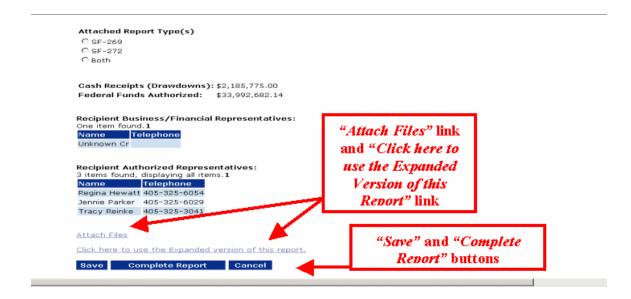
When a report is created, data related to *Cash Receipts (drawdowns)* and *Federal Funds Authorized* is retrieved from the CBS system. Once this report has been submitted to NOAA, these fields are locked records and are no longer pulled from the CBS system.

Final Report ○ Yes ● No	
Reporting Period * (mm/dd/yyyy)	- (mm/dd/yyyy)
Due Date (mm/dd/yyyy)	
Attached Report Type SF-269 SF-272 Both	(s)
Cash Receipts (Drawd Federal Funds Author	owns): \$2,185,775.00 zed: \$33,992,682.14
Recipient Business/Fin One item found. 1 Name Telephone Unknown Cr	nancial Representatives:



Creating Financial Progress Report – Expanded Version

Step 1: At the bottom of the *Federal Financial Report - Simple Version* screen (see previous section Step 9), you can click the link entitled, *Click here to use the Expanded version of this Report.*





Step 2: Below is the Expanded Version of the Federal Financial Report.

Federal Financial Report - NA17RJ1227 Please click on this icon to add your comments or view comments by other users on this report:_ 1. Federal Agency and Organization Element to which Report is submitted Department of Commerce/NOAA 2. Federal Grant or Other Identifying Number Assigned by Federal Agency (To report multiple grants, use FFR Attachments) NA17RJ1227 3. Recipient Organization (Name and complete address including zip code) University of Oklahoma 1000 Asp Avenue, Room 314 Norman, OK 73019 4a. DUNS Number 4b. EIN Number 5. Recipient Identifying Number or Account Number 0 736017987 NOAA 6. Final Report 7. Basis of Accounting * C Cash C Accrual O Yes ⊙ No. 8. Project/Grant Period 07/01/2001 - 04/30/2007 9. Reporting Period * 01/01/2005 09/01/2005 10. Transactions 11. Remarks Recipient Business/Financial Representatives: One item found.1 Name Telephone Unknown Cr Recipient Authorized Representatives: 3 items found, displaying all items.1 Name Telephone Regina Hewatt 405-325-6054 Jennie Parker 405-325-6029 Tracy Reinke 405-325-3041



Save Done Cancel



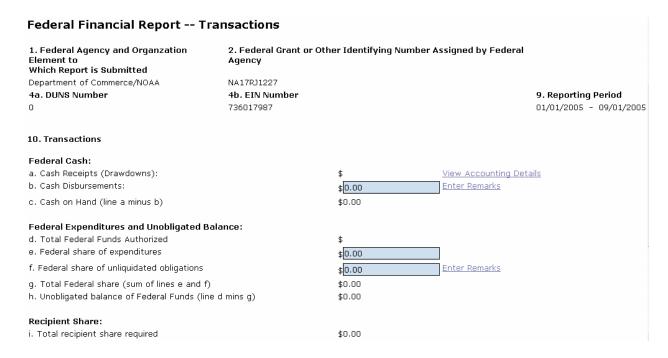
Print Report

Click here to use the Simple version of this report.

Step 3: At the bottom of the Expanded Version of the Federal Financial Report, click on the link entitled, *Transactions* to enter financial report information.



Step 4: Enter financial report transaction information and click the *Save* button at the bottom of the screen.

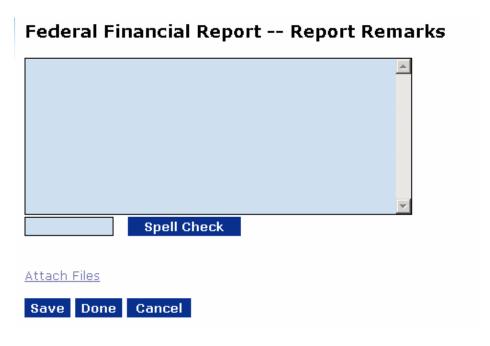




Step 5: At the bottom of the Expanded Version of the Federal Financial Report, click on the link entitled, *Remarks* to enter comments related to the financial report.

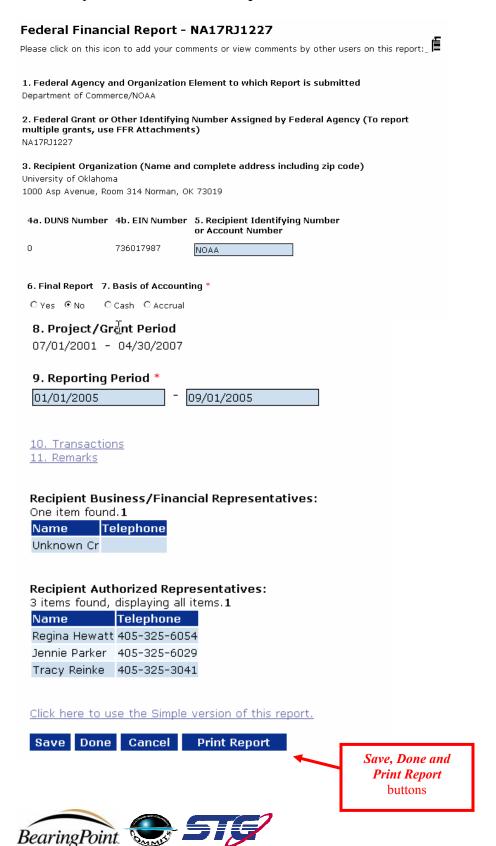


Step 6: Enter comments and click the *Save* button, followed by the *Done* button. You can also attach files by clicking on the *Attach Files* link.

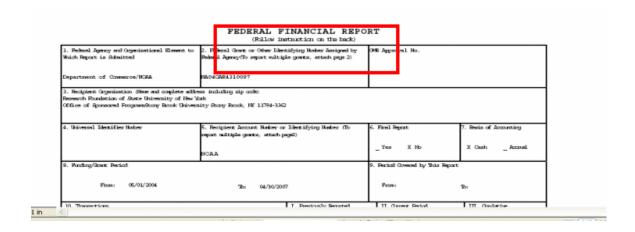




Step 7: Once all the data has been entered, click *Save* followed by the *Done* button. You also have the option to click the *Print Report* button.



Step 8: After clicking the *Print Report* button, the following screen displays the printable Federal Financial Report.



Step 9: If you click on the *Workflow History* link on the Financial Progress Report screen, you can view details on the actions taken on the report.

Federal Financial Report - NA17RJ1227

Id: 2018889

Creator:Syed RazaCreate Date: 11/14/2005Status:Federal Financial Report Review Federal Financial Report Not StartedStatus Date: 11/16/2005

Last Edited User: Fahima Zahir

Go to Federal Financial Report Details Page >>

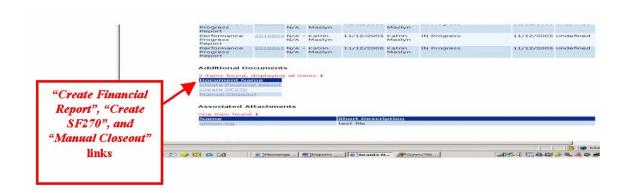
Workflow History link

This document currently has no tasks assigned to you. However, you may view previous workflow history and comments >>



Creating the SF270 Report – Simple Version

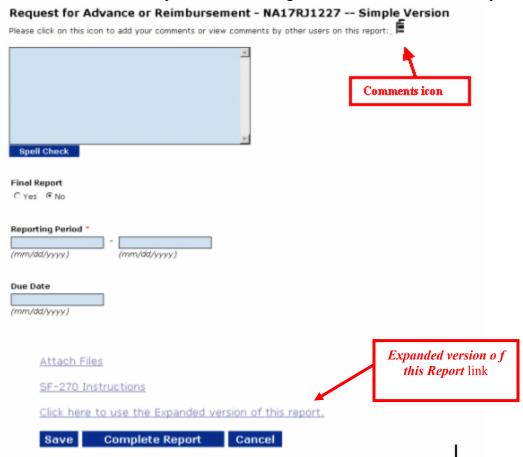
Step 1: Complete steps 1 through 5 in the *FinancialProgress Reports – Simple Version* section. Scroll down to the bottom of the *Grants File* screen to view the *Additional Documents* section and select the *Create SF270* link.





Step 2: The *Request for Advance or Reimbursement - Simple Version* screen is displayed. Complete the report information as required.

Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

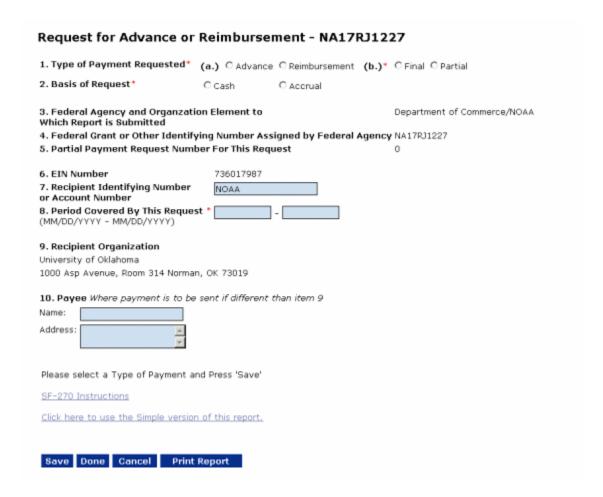


Step 3: Once all the information has been entered, you can click the *Save* button followed by the *Complete Report* button. To complete the expanded version of the report select the link entitled, *Click here to use the Expanded version of this Report*.



Creating the SF270 Report – Expanded Version

Step 1: Upon selecting the link entitled *Click here to use the Expanded version of this Report* (see step 3 in prior section), the following screen is displayed. Enter report information and click the *Save* button followed by the *Done* button.



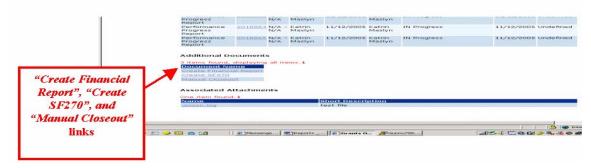


Step 5: After clicking the *Print Report* button, the following screen displays the printable SF270 Report.

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PEDERAL SPONSORING AGENCY AND ORGANIZATIONAL ELEMENT MICH THIS REPORT IS SUBMITTED AGENCY OF THE PROPERTY OF T		4. PEDERAL GRANT OR IDENTIFYING NUMBER A PEDERAL AGENCY NALTHILLY		E. PARTIAL PAYMENT NUMBER FOR THIS R	
6. EMPLOYER IDENTIFICATION NUMBER			PERIOD COVERED BY THIS REQUEST		
756013997	SOAA	PROM (search, day, year)		20 (ecnth, day, year)	
9. RECEPTENT ORGANIZATION		10. WSS (Mare check is to	be such if diffe	ment than then S)	
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				O DESCRIPTION	
n.	COMPUTATION OF AMOUNT OF				

Completing Manual Closeout

Step 1: Complete steps 1 through 5 in the *Financial Progress Reports – Simple Version* section. Scroll down to the bottom of the *Grants File* screen to view the *Additional Documents* section and select the *Manual Closeout* link.



Step 2: Complete the closeout questionnaire and click the *Save* button. You may attach files using the *Attach Files* link at the bottom of the page. Once you click the *Close Award* button, the document will be locked and you will not be able to make any modifications.

Manual Closeout NA17RJ1227	
Has the Recipient Organization: University of Oklahoma	completed the following closeout documents?
Does this Award have inventions to disclose? If so, were all inventions to this Award entered into iEdison?	C Yes C No ⓒ N/A
Does this Award have property to return?	€ Yes ○ No
Final Progress Report:	C Yes C No € N/A
Final Comprehensive Progress Report:	○ Yes ○ No ⓒ N/A
Final Financial Report:	€ Yes C No C N/A
Final Comprehensive Financial Report:	C Yes C No ⓒ N/A
Attach Files Save Close Award Cancel	
date diese mara dancer	



Accessing Existing Financial and Project Progress Reports

Step 1: In order to search Financial and Project Progress Reports, select the **Search Financial** and **Project Progress Reports** link from the **Award** tab.

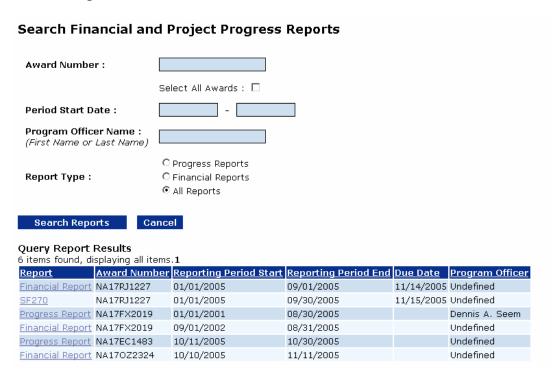


Step 2: The screen below is displayed. Enter at least one search criterion, including *Award Number*, *Period Start Date*, *Program Officer Name* and *Report Type*. After entering the search criteria, click the *Search Reports* button.



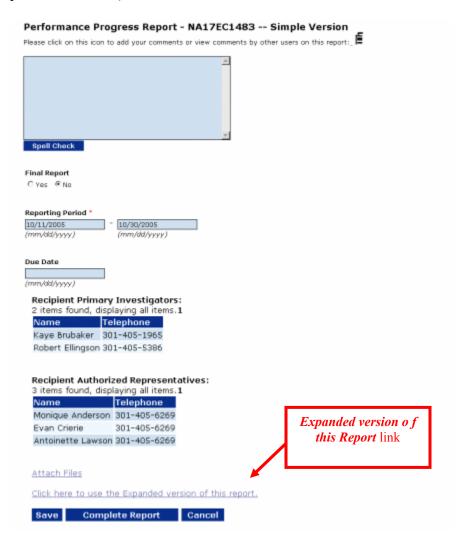


Step 3: The search results display all report types including the Project Progress Reports and Financial Reports. To view a specific report, select the link for the report you would like to view from the *Report* column.





Step 4: If you selected Progress Report in Step 3, the *Performance Progress Report - Simple Version* screen is displayed. (Please note that if you selected Financial Report in Step 3, Grants Online will take you to the Extended Version of the Federal Financial report, as detailed in the previous section.)



Step 5: To view the Expanded version of the *Performance Progress Report*, click on the link entitled, "*Click here to use the Expanded version of this report.*" Please note that the *Expanded Version* of this report has not yet been approved by OMB for use at NOAA. Further guidance will be provided regarding this report at a later date.

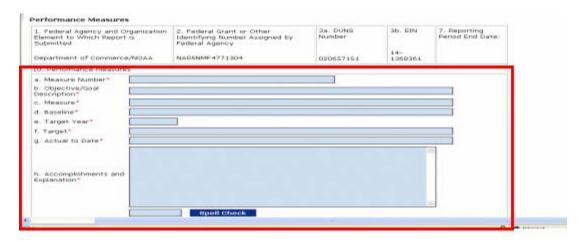


Step 6: The data from the Performance Progress Report – Expanded Version includes links to the *Performance Measures, Program Project Management, Sub-Award Management, Activity Based Budget,* and *Performance Narrative* at the bottom of the screen.

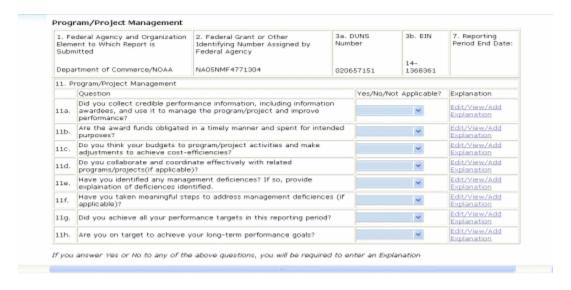
Please click on		your comments or view c	omments by other users	on this report:_ =	3b. EIN	
Organization Element to Which Report is Submitted		2. Federal Grant or Other Identifying Number Assigned by Federal Agency				
Department of Commerce/NOAA		NA17EC1483		0	526002033	
University of M	ganization (Nan Iaryland, College ing College Park	5. Recipient Identifying Number or Account Number				
6. Project/Grant Period 7.		7. Report Period		8. Final Report C Yes © No		
Start Date: (Month, Day, Year)	End Date: (Month, Day, Year)	Start Date:(Month, Day, Year) *	End Date:(Month, Day, Year) *	9. Reporting Term or Frequency Semi-Annually Quarterly Other (if Other, Describe:		
09/01/2001	08/31/2006	10/11/2005	10/30/2005			
Performance Measures						
Program/Project Management						
Sub-Award Management						
Activity Based Budget Performance Narrative						
Other Attachments						



Step 7: Upon selecting the *Performance Measures* link, view the data provided.

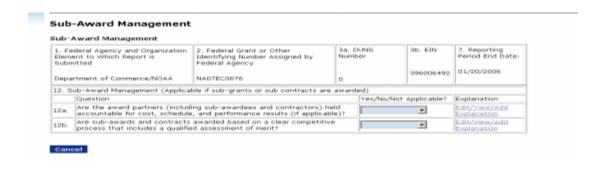


Step 8: Upon selecting the *Program/Project Management* link, view the data provided.

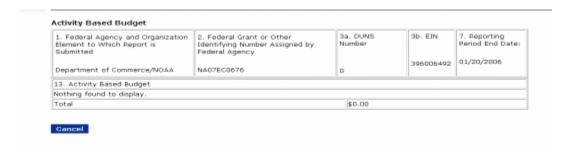




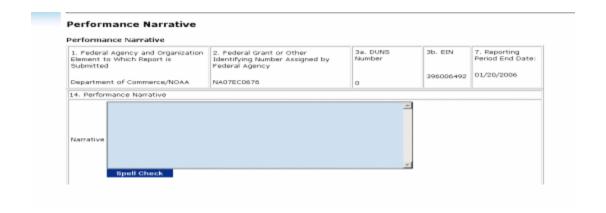
Step 9: Upon selecting the *Sub-Award Management* link, view the data provided.



Step 10: Upon selecting the Activity Based Budget link, view the data provided.



Step 11: Upon selecting the *Performance Narrative* link, view the data provided.





Step 12: To view the printable version of the Project Progress Report, select the *Print Report* button from the *Performance Progress Report –Simple Version* screen.



Step 13: The following screen displays the printable version of the Project Progress Report.

